

# 4.05. Programs

There are a number of ways of modelling programs in mSupply:

- completely separate sets of virtual stores for each program (see section [22.08. Virtual stores](#))
- tag stock with different program labels in the same store (see section [7.06. Custom stock fields](#))
- use the donor field as the program label (see section [7.07. Managing donors](#))
- and probably a few more ways you can think of!

You can also manage requisitions by program. This involves using some special settings for master lists. In this method, a program is an extension to a [master list](#). A program includes a standard list of items as well as:

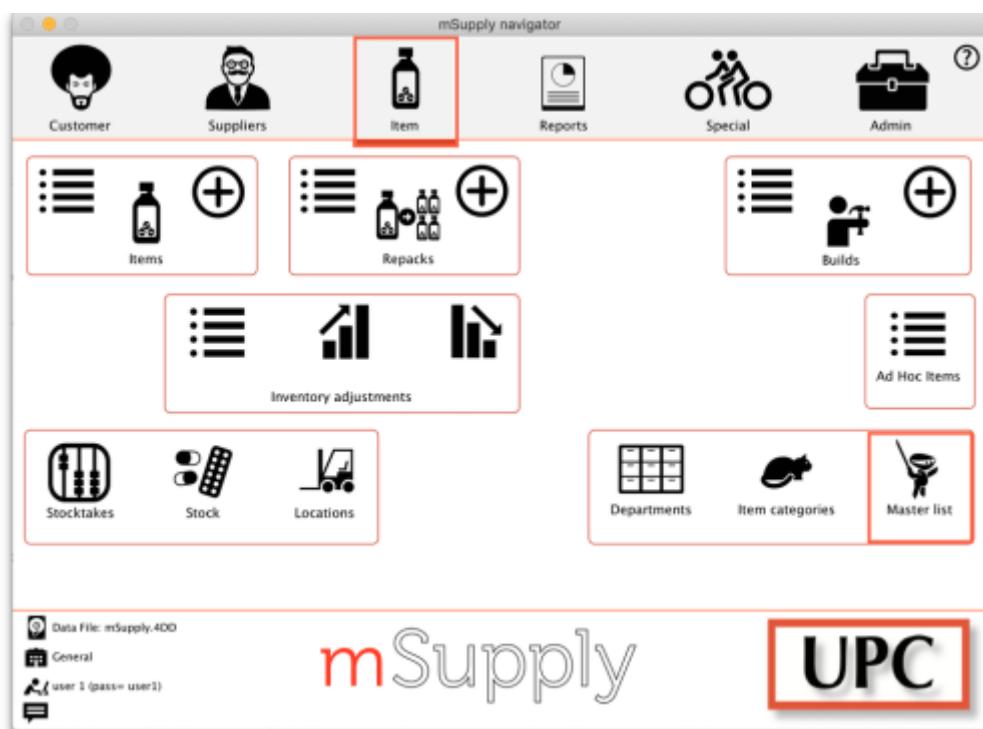
- **Order Types:** defined categories setting the maximum number of orders and quantity of stock to be ordered per period.
- **Period Schedules:** defined time intervals when orders can be placed; [schedules and periods](#) must be set up **before** creating programs.
- **Regimen Data:** a defined list of additional information that may need to be provided by a customer when making a program requisition.

Examples of items commonly managed by programs include Malaria, HIV and TB medicines and medical supplies.

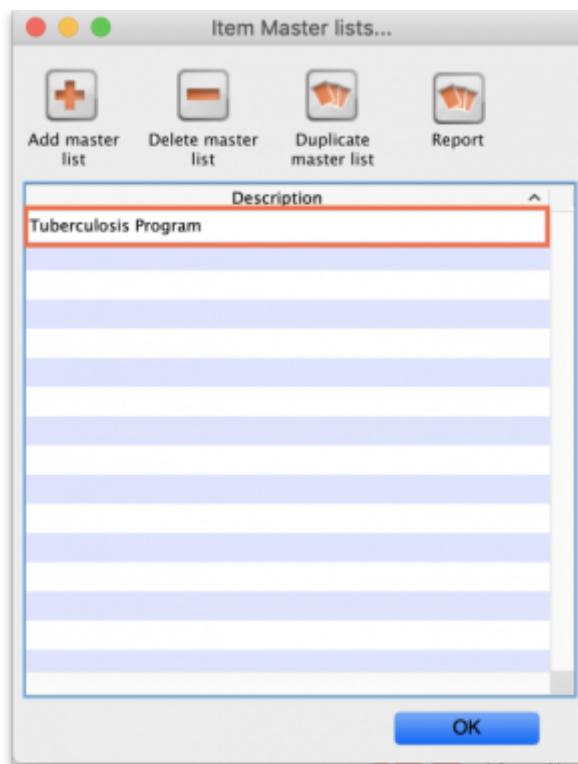
## 4.05.01. Creating a program

A program is defined by additional settings made to a master list:

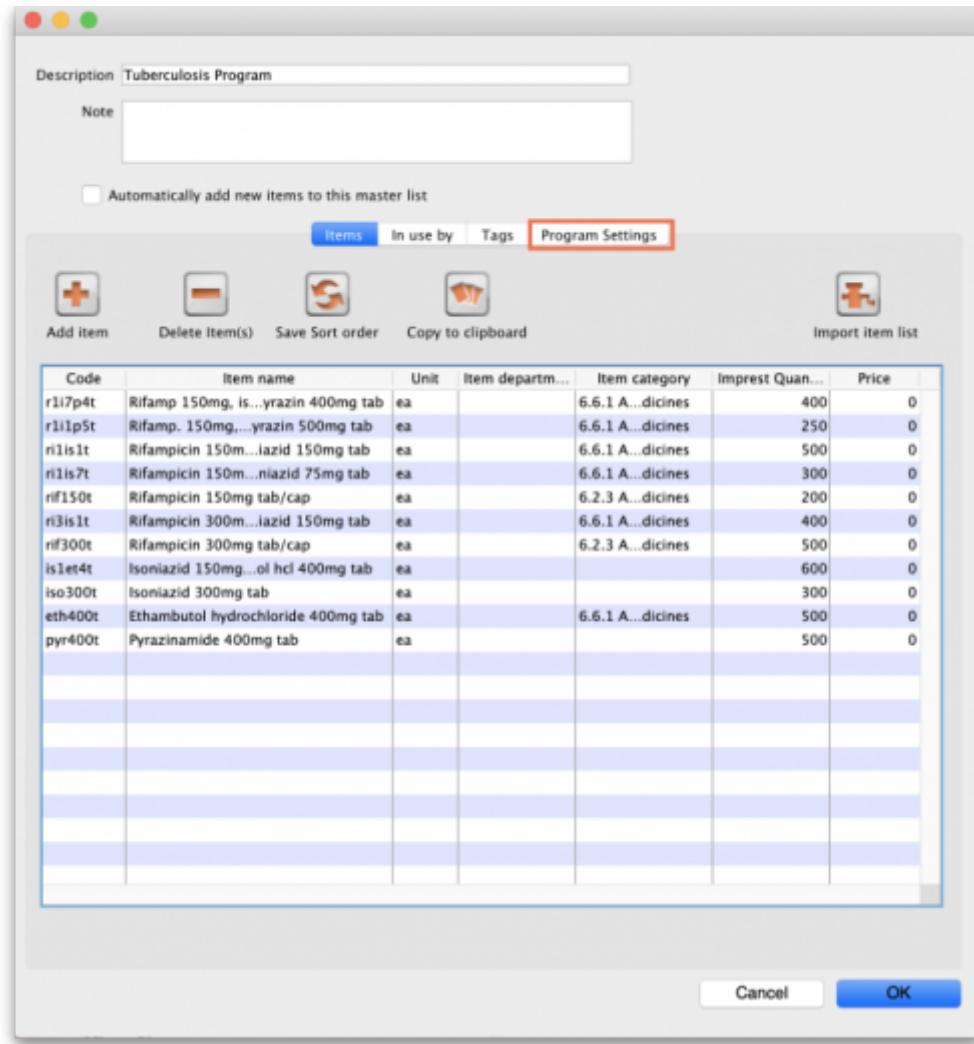
1. Navigate to the **Item** tab and click the **Master List** icon:



2. Double-click on a master list to open it (or [create a new master list](#)):



3. The Master list details window opens. Click on the **Program Settings** tab:



4. This shows all the settings available for a program:

Add item master list

Description	Test master list	Created date:	17/10/2024																																			
Note	Created by: mSupply Support																																					
Discount %	0																																					
<input type="checkbox"/> Automatically add new items to this master list <input type="checkbox"/> This master list is a patient list <input type="checkbox"/> Is default price list																																						
<a href="#">Items</a> <a href="#">In use by</a> <a href="#">Tags</a> <a href="#">Program Settings</a>																																						
<input checked="" type="checkbox"/> This master list is a program <input type="checkbox"/> HIV program <input type="checkbox"/> Immunisation program eLMIS integration code: <input type="text" value="1234567890"/>		<input style="float: right; margin-right: 10px;" type="button" value="+"/> <input style="float: right; margin-right: 10px;" type="button" value="-"/>																																				
<b>Program tags</b> Tag: <input type="text"/> Period schedule: <input type="text"/> Order types: <table border="1" style="width: 100%; border-collapse: collapse;"> <thead> <tr> <th>Name</th> <th>Type</th> <th>Max. orders per period</th> <th>Max MOS</th> <th>Max. lines</th> <th>Threshold MOS</th> <th>Emergency</th> </tr> </thead> <tbody> <tr><td></td><td></td><td></td><td></td><td></td><td></td><td></td></tr> <tr><td></td><td></td><td></td><td></td><td></td><td></td><td></td></tr> <tr><td></td><td></td><td></td><td></td><td></td><td></td><td></td></tr> <tr><td></td><td></td><td></td><td></td><td></td><td></td><td></td></tr> </tbody> </table>				Name	Type	Max. orders per period	Max MOS	Max. lines	Threshold MOS	Emergency																												
Name	Type	Max. orders per period	Max MOS	Max. lines	Threshold MOS	Emergency																																
<b>Regimen data</b> <table border="1" style="width: 100%; border-collapse: collapse;"> <thead> <tr> <th>Code</th> <th>Name</th> <th>Type</th> <th>Default</th> </tr> </thead> <tbody> <tr><td></td><td></td><td></td><td></td></tr> <tr><td></td><td></td><td></td><td></td></tr> <tr><td></td><td></td><td></td><td></td></tr> </tbody> </table>				Code	Name	Type	Default																															
Code	Name	Type	Default																																			

[OK & Previous](#) [OK & Next](#) [Cancel](#) **OK**

5. Tick the **This master list is a program** checkbox to enable the program based features for this master list.

- Create a **Store tag** for the program by clicking on the  button just above the **Store tag** section.
- The **Tag** field will be automatically populated with a new tag. Edit this new tag name and click on the  button.
- The field then becomes a drop down list which will contain any existing name tags for you to select. The tick button also becomes a modify button . If you click it you will be able to edit the tag name you just entered.
- When you click on the **OK** button any new tags you have created will be saved and will appear in the name tags list (see the [5.05. Name tags](#) page for details).



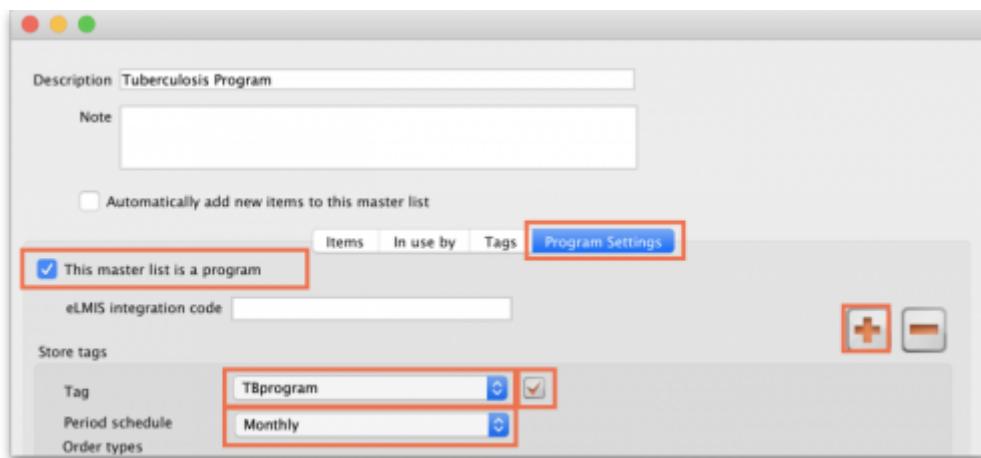
You can edit the tags entered here **until** you close this window. After that, you cannot edit existing ones, you can only delete them and add new ones.

Any customers or stores that have a name tag matching the tag you set here will be able to use this **program** and the **schedule** you have set for that tag.



You can define multiple tags for each program. For each tag, you set up both a [schedule](#) and order types- so for one program, you can have different facilities on different schedules

6. Select the **Period Schedule** from the dropdown list (you must have set up the [schedules](#) and [periods](#) first):



7. For each period schedule, one or more **Order Types** can be created - these set the parameters for program requisitions. Add order types by clicking the plus icon.

8. Give each order type a unique name and set its parameters:

- **Emergency:** check this box if the order type is for emergencies.
- **Max orders per period:** maximum number of orders that can be placed in a given period.
- **Max MOS:** maximum number of months' stock to be kept for each item. Used in the calculation of the suggested amount to order.
- **Threshold MOS:** items with a number of months' stock less than this value will appear in the order by default.
- **Max lines:** maximum number of items allowed to be ordered for an emergency order (default = 5); an alert will appear if the user tries to exceed the maximum number of items allowed.

The screenshot shows a software window with two tables. The top table, titled 'Order types', has columns for 'Type', 'Max. orders per period', 'Max MOS', 'Max. lines', 'Threshold MOS', and 'Emergency'. The bottom table, titled 'Regimen data', has columns for 'Code', 'Name', 'Type', 'Default', and 'Is Required?'. Each table has an 'Add' button (a blue square with a white plus sign) in the top right corner. The entire window has 'Cancel' and 'OK' buttons at the bottom right.

#### 4.05.02. Adding indicators to a program

Indicators are used for reporting on the performance of programs, e.g. the number of patients treated. Each indicator value provides data on a metric for a particular store and regimen over a given period. Indicator values are recorded while creating a program requisition.

 Indicators can record any relevant programme data, including that data that may be used to select a regimen (defined as a treatment plan that specifies the dosage, the schedule, and the duration of treatment.) The country that funded this feature uses the term **Regimen data** for these indicators, and so that term has been used in this window.

Indicators allow an organisation to analyse regimen performance and determine what further data should be collected, stored and processed.

To add indicators to a program:

- Open the program via the **Master List** (Click on the **Master list** icon on the *Item* tab of the Navigator).
- Click on the **Program Settings** tab.
- In the **Regimen Data** table add fields for the data that should be provided to the supplier with each program requisition
- Check the **HIV program** checkbox if you want a fixed set of HIV-related indicators to be entered for this program.
- If the customer **must** provide this information for supply to occur, tick the **Is required?** box to make this a mandatory requirement.

Add item master list

Description	Test master list	Created date:	17/10/2024
Note		Created by:	mSupply Support
Discount %	0		
<input type="checkbox"/> Automatically add new items to this master list			
<input type="checkbox"/> This master list is a patient list			
<input type="checkbox"/> Is default price list			

Items In use by Tags Program Settings

This master list is a program  HIV program  Immunisation program

eLMIS integration code:

Program tags

Tag		<input type="button" value=""/>				
Period schedule		<input type="button" value=""/>				
Order types						
Name	Type	Max. orders per period	Max MOS	Max. lines	Threshold MOS	Emergency

Regimen data

Code	Name	Type	Default

### 4.05.03 Connecting a program to a store

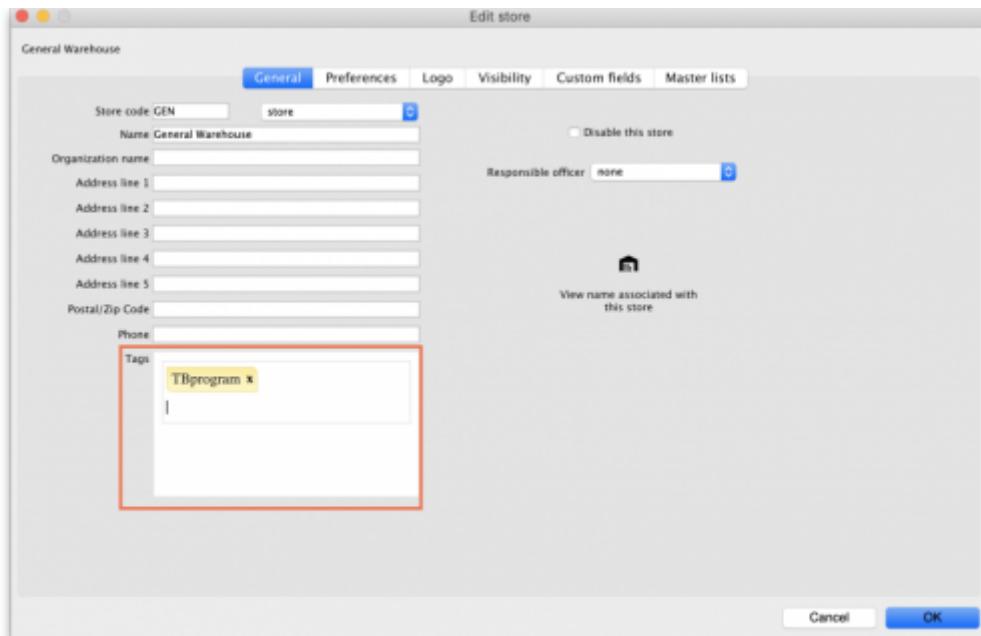
To allow a store to place program requisitions:

1. Navigate to the **Special** tab and click on the **Stores** icon:

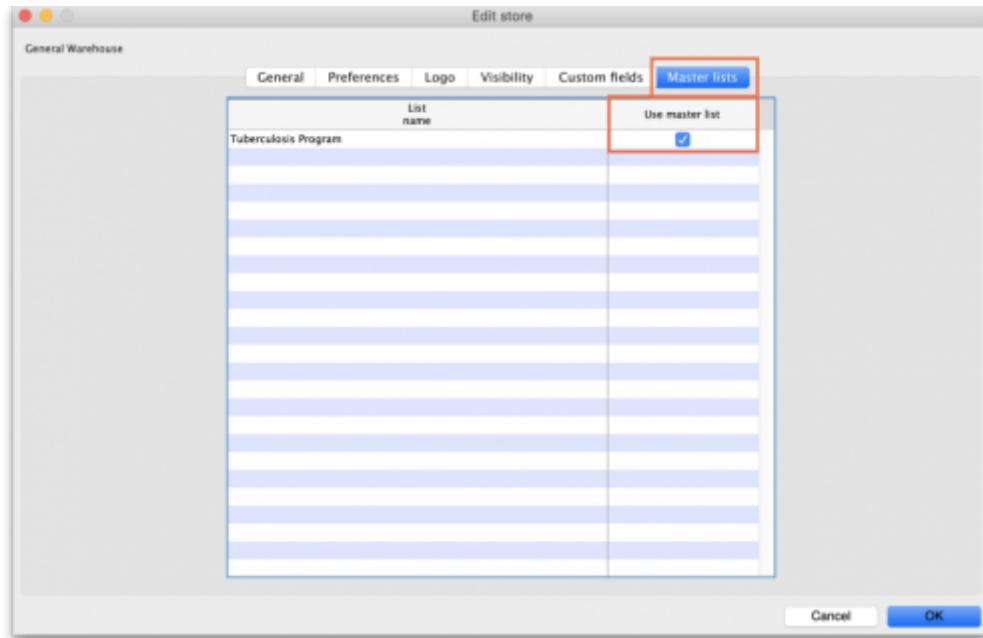


2. Double click on the store.

3. In the **Tags** field, type in the Store Tag you set for the program and schedule above then press **Tab**.



4. Click on the **Master Lists** tab, check the **Use master list** box next to the program master list to be used:

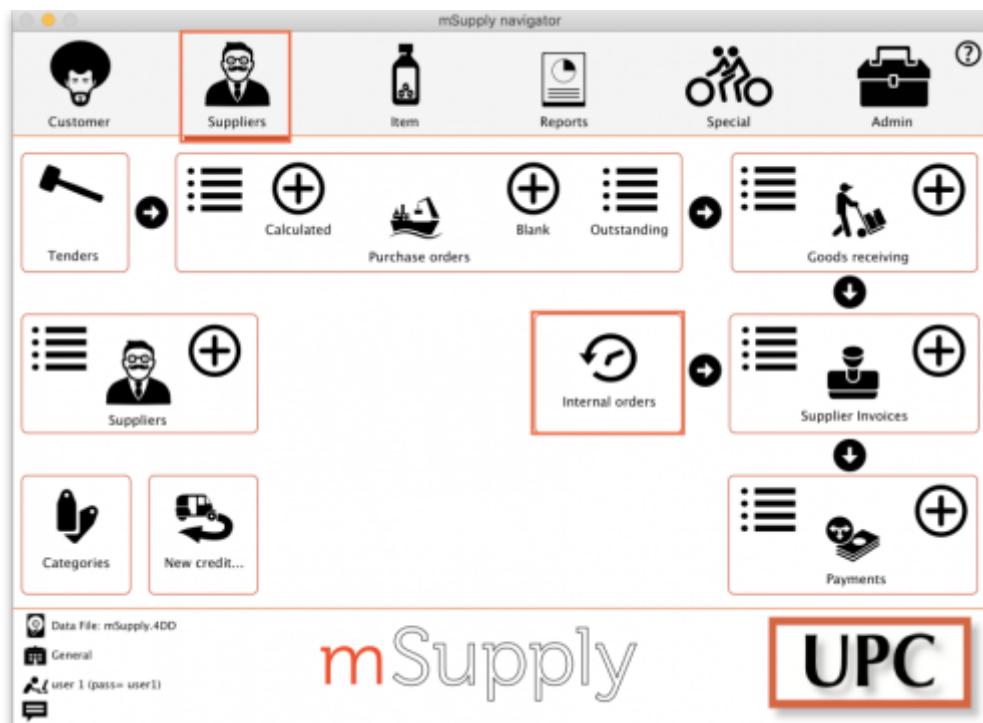


5. All done - the store is now connected to the program you have created so click on the **OK** button to save all the settings.

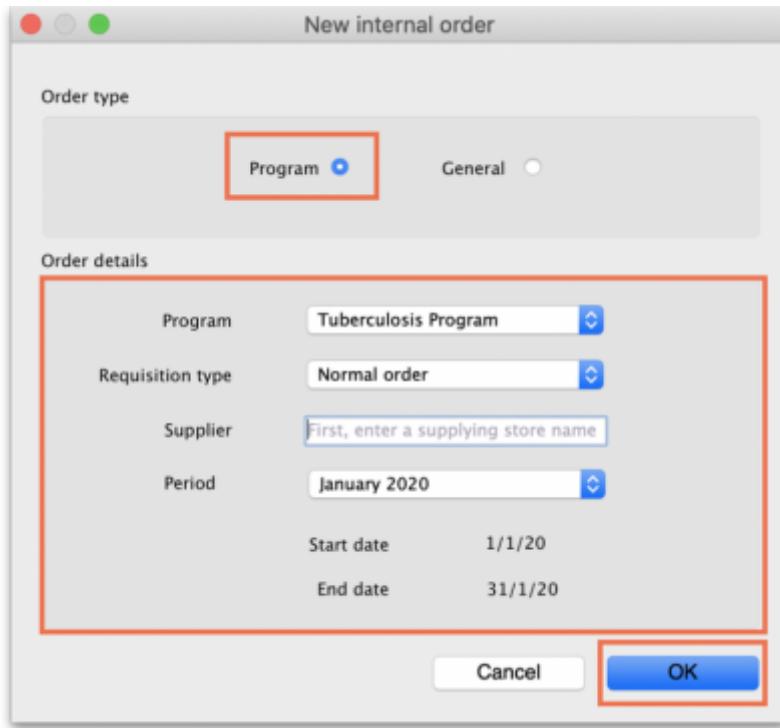
#### 4.05.04. Creating a program requisition

Once a store has been connected to a program, it can then place program requisitions:

1. In the customer store, navigate to the **Suppliers** tab and click on the **Internal Orders** icon:



2. Click **New Internal Order**. When a store uses programs, they will have the option to create a **Program** order or **General** (regular) order:



Check the **Program** button to create a program requisition.

3. In the **Order Details** section, select the **Program**, **Requisition Type** and **Period** from the dropdown lists. Enter the **Supplier** by typing the first few letters, pressing *Tab* and selecting the supplier from the list of those starting with what you typed. These details need to be entered sequentially as the program uses them to determine the requisition type, which in turn determines the period.

 The **maximum number of program orders** that can be requested within a given period is set when the program is created (*Max. orders per period*).

If you try to create another order for the same period which **exceeds the maximum number**, an error message will appear and you will not be able to proceed.

4. Click **OK** to generate an internal order with all the items listed in the program master list. The details relating to the program order are in the top left. Review the data in the table, then enter the quantity of stock to be ordered in the **User requested quantity** column:

Supplier: Central Medical Stores CMS Order date: 22/01/19 Black Program: Tuberculosis Program Order type: Regular Period: January 2020 From: 1/1/20 To: 31/1/20 Filter items: Filter by item name or code

Reference: Comment: Max MOS: 3.0 Threshold MOS: 1.0 Hide stock over threshold

ID: 5 Status: sq Type: request Entry date: 22/01/19 Entered by: user 1 (pass=st) Print Store: General

**Data entry Log Custom data**

U...	Item code	Item name	Unit	Our stock on hand	Average monthly consumption	Months of stock	Calculated quantity	User requested quantity	Comment
1	11794	Rifamp 150mg, is... pyrazin 400mg tab	ea	0	0	0	0	20	
2	11395	Rifamp 150mg, is... pyrazin 100mg tab	ea	0	0	0	0	30	
3	11611	Rifampicin 150mg, isoniazid 150mg tab	ea	0	0	0	0	40	
4	11617	Rifampicin 250mg...isoniazid 75mg tab	ea	0	0	0	0	100	
5	11750	Rifampicin 150mg tab/cap	ea	0	0	0	0	50	
6	11611	Rifampicin 300mg...isoniazid 150mg tab	ea	0	0	0	0	60	
7	11300	Rifampicin 300mg tab/cap	ea	0	0	0	0	100	
8	11614	Isoniazid 150mg +...tol hcl 400mg tab	ea	0	0	0	0	100	
9	11610	Isoniazid 300mg tab	ea	0	0	0	0	80	
10	11640	Ethambutol hydrochloride 400mg tab	ea	0	0	0	0	50	
11	11790	Pyrazinamide 400mg tab	ea	0	0	0	0	70	

**Save Sent order**

Finalise

**Data entry Log Custom data**

Cancel OK & Next OK

5. Click the **Indicators** tab to enter the additional data defined for the program:

Supplier: CMS Order date: 24/01/20 Black Program: HIV Order type: Order type Period: DECEMBER 2018 From: 1/12/18 To: 31/12/18

Reference: Comment: Max MOS: 3.0 Threshold MOS: 1.0 Hide stock over threshold

ID: 1 Status: nw Type: request Entry date: 24/01/20 Entered by: Admin Store: mobile

**Data entry Log Indicators**

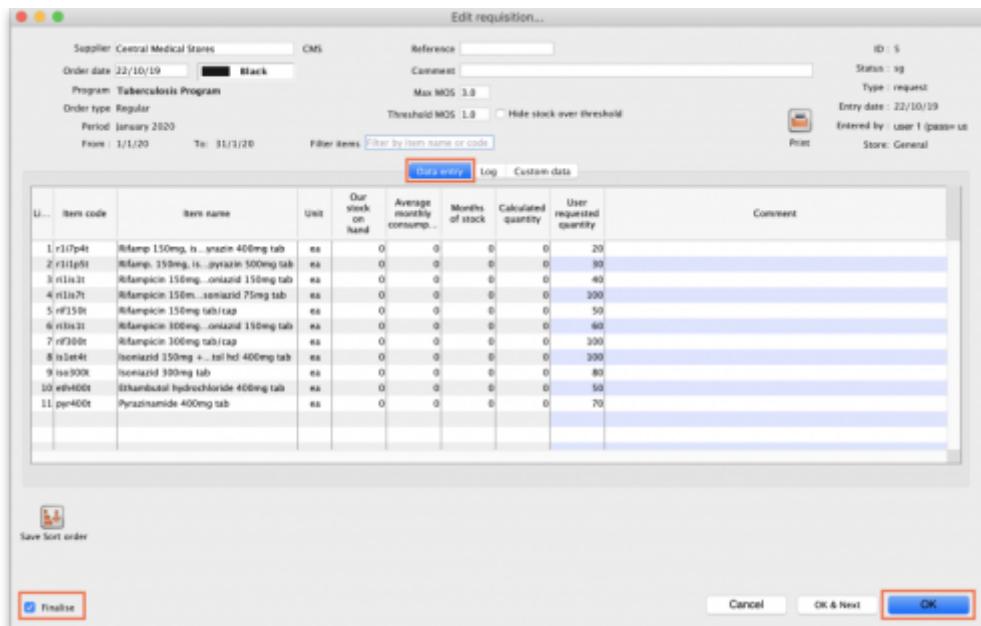
Name	Code	Valeur	Commentaire
Regimen Data Name	Regimen Code1	0	

Description	Code	Patients adultes reçus	Patients enfants reçus	Patient stable adulte	Patient stable enfant	Nouvelle inclusion adulte	Nouvelle inclusion enfant
Régime A...ère Ligne	AZT/3TC/NVP	0	0	0	0	0	0
Régime A...ère Ligne	AZT/3TC/DFV	0	0	0	0	0	0
Régime A...ère Ligne	AZT/3TC/TDF	0	0	0	0	0	0
Régime A...ère Ligne	AZT/3TC/DPV/r	0	0	0	0	0	0
Régime A...ère Ligne	DDI/3TC/DPV/r	0	0	0	0	0	0
Régime A...ère Ligne	DDI/3TC/DPV/r	0	0	0	0	0	0
Régime A...ère Ligne	ABC/3TC/ABC	0	0	0	0	0	0
Régime A...ère Ligne	ABC/3TC/NVP	0	0	0	0	0	0
Régime A...ère Ligne	ABC/3TC/DPV/r	0	0	0	0	0	0
Régime A...ère Ligne	ABC/3TC/DFV	0	0	0	0	0	0

Cancel OK & Next OK

This data will be sent to the supplier with the requisition when the requisition is finalised.

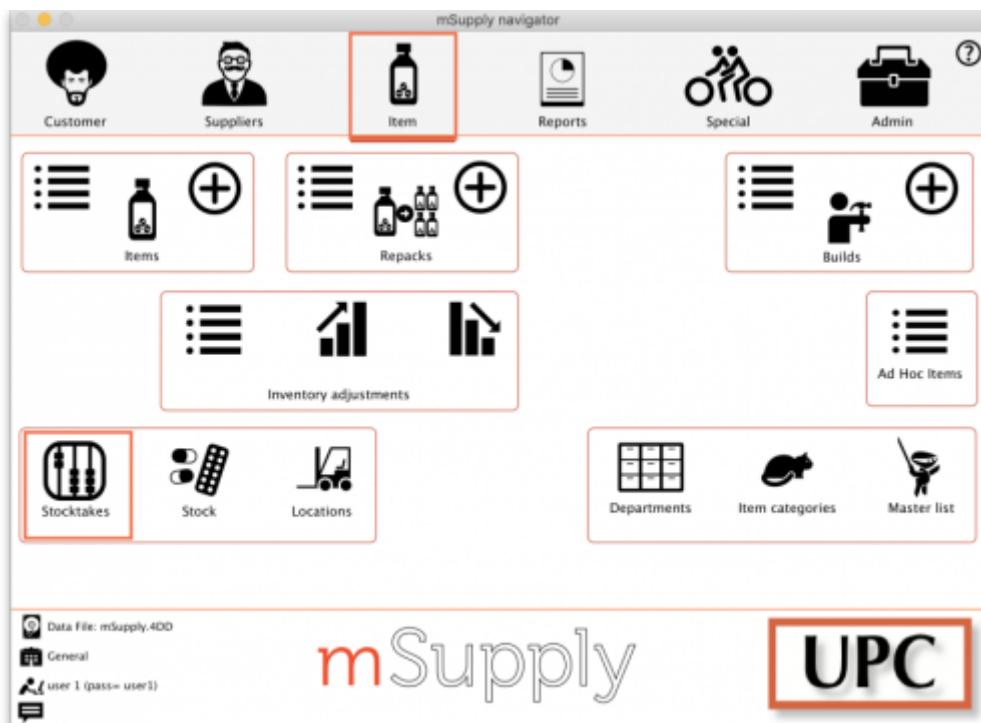
6. To send the program requisition to the supplier, return to the **Data Entry** tab, check the **Finalise** box and click **OK**.



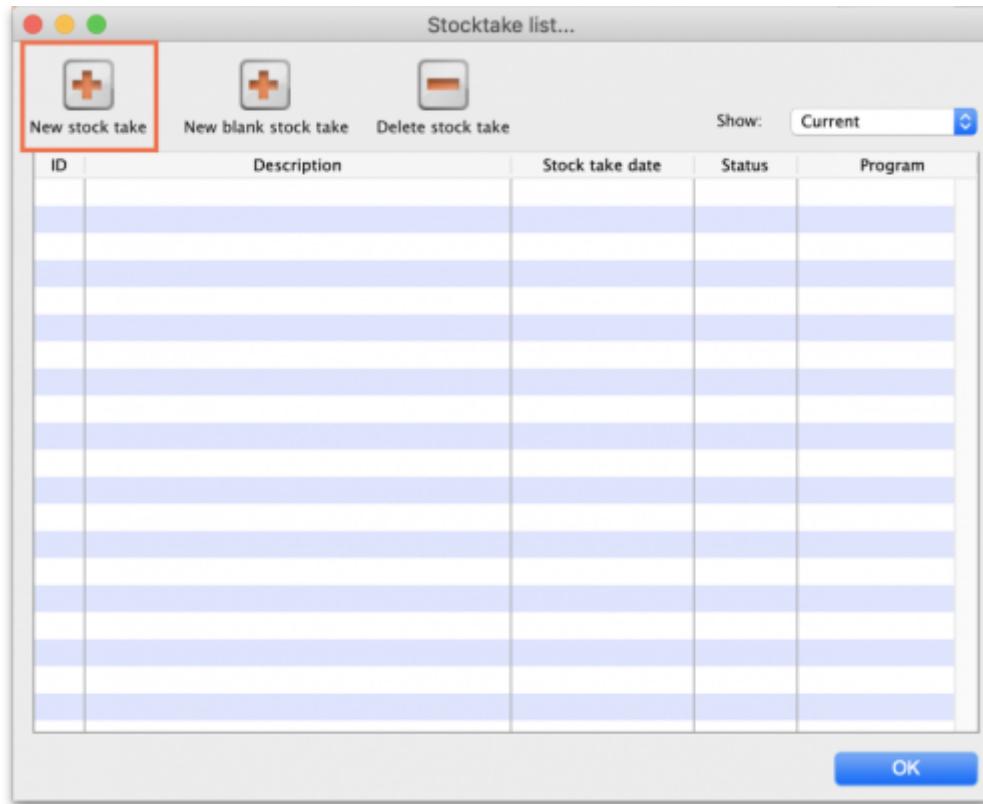
## 4.05.05. Creating a program stocktake

Creating a stocktake with items from a particular program is just the same as creating a normal stocktake. The only difference is that you select the program in the **Master list** (or **Program**) filter:

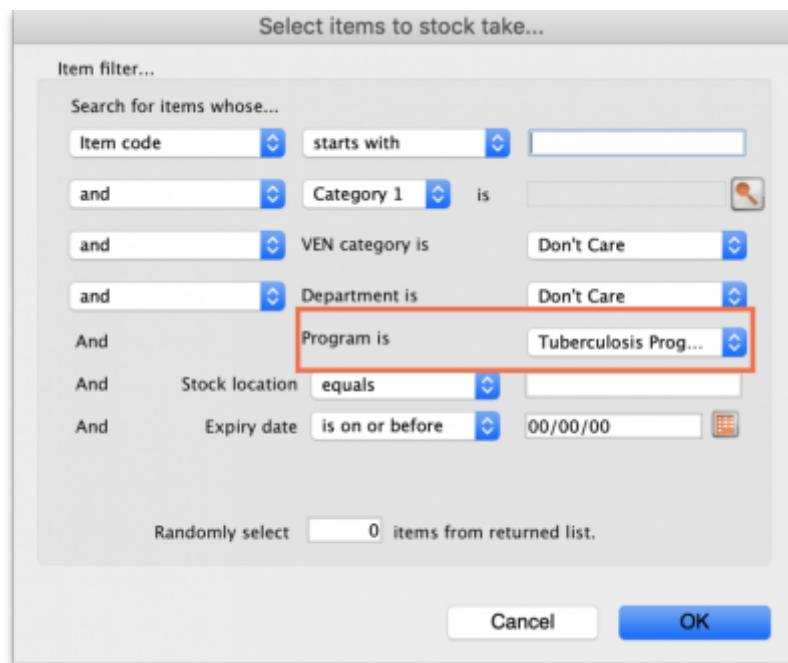
1. Navigate to the **Item** tab and click the **Stocktakes** icon:



2. The list of stocktakes window opens. Click the **New Stocktake** icon:



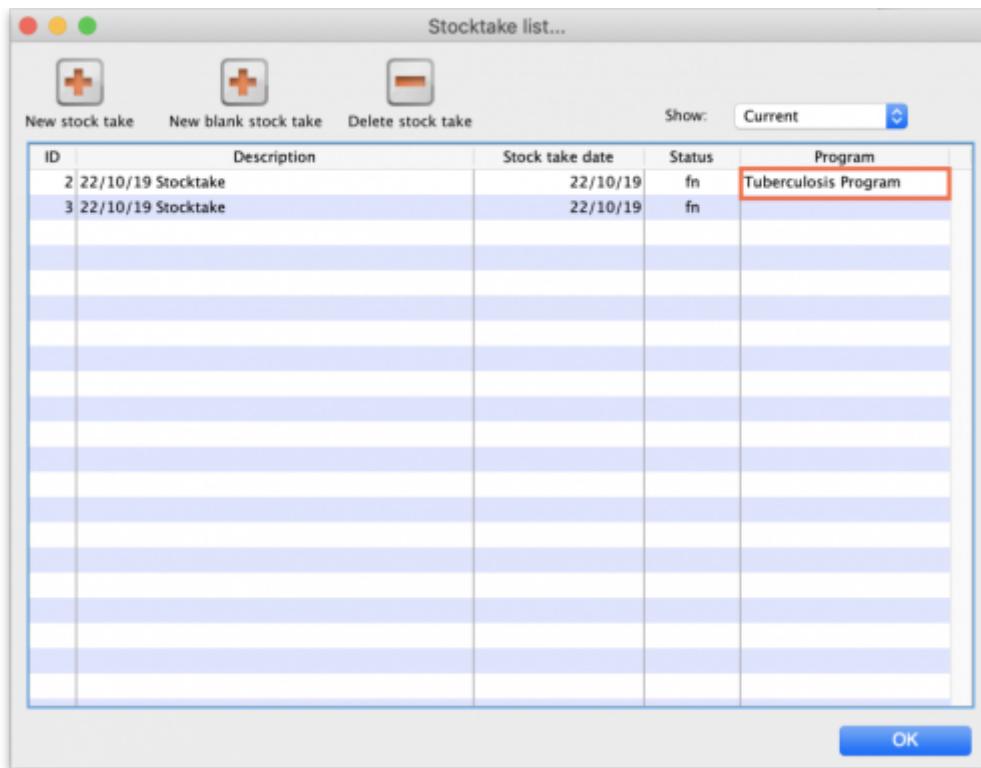
3. Select the program from the **Program is** (or **Master list is**) dropdown menu and click the **OK** button to pre-populate your stocktake with items from the program:



Note: To further refine the selection of stock appearing in the stocktake you can also select other filter items at the same time.

**For detailed information on how to complete the stocktake, refer to the [4.17. Stocktakes section](#).**

Tip: In your stocktakes list, you can easily identify program stocktakes by referring to the **Program** column:



Previous: [4.04. Item master lists](#) | | Next: [4.06. Stock locations and location types](#)

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